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COFFEE
FCOF 5-65
October 1965

LARGE WORLD COFFEE CROP

EXPECTED IN 1965-66

The Foreign Agricultural Service's second estimate (September) of the 1965-66 world coffee crop put total production at 76.8 million bags 1/, and exportable production 2/ at 62.0 million bags. This estimate is up slightly from the June estimate and considerably larger than the small 1964-65 crop, for which total and exportable production are estimated at 51.8 and 37.2 million bags, respectively.

U. S. gross imports were down to 9.2 million bags in the first 6 months of 1965, as compared with 11.8 million bags during the same period in 1964. Total imports of 22.8 million bags for calendar 1964 were nearly a million bags below the 1963 figure.

The International Coffee Organization (ICO) met in London in August to review the International Coffee Agreement (ICA) to date. Export quotas for individual countries were set following a decision that the total global quota should initially be put at a level of 43.7 million bags for the 1965-66 coffee year (October 1, 1965 - September 30, 1966). In light of the expected large crop in 1965-66 and continually increasing world production, the ICO also moved to implement Articles 48 and 49 of the ICA, which call for the setting of individual and world production goals, and for production control programs in member countries.

Production

North America: The total 1965-66 North American production is estimated at 11.1 million bags, with exportable production at 8.2 million bags. The respective figures in 1964-65 were 10.3 and 7.4 million bags.

1/ All bags in text and tables equal 132.276 pounds each. 2/ Exportable production: Total production minus domestic consumption.

GREEN COFFEE: World total production for the marketing year 1965-66, with comparisons 1/

Continent and country	Average 1955/56- 1959/60	1962-63	1963-64	1964-65	2nd estimate 1965-66
	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>
North America:					
Costa Rica	734	1,050	1,100	825	925
Cuba	713	650	475	600	500
Dominican Republic	549	570	690	675	700
El Salvador	1,436	1,650	2,000	1,900	2,080
Guatemala	1,357	1,900	1,790	1,600	1,900
Haiti	600	590	530	555	585
Honduras	321	410	395	420	460
Mexico	1,716	2,200	2,855	2,650	2,900
Nicaragua	376	505	450	560	510
Panama	<u>3/</u> 27	73	80	85	90
Trinidad & Tobago	44	60	75	75	80
Other <u>4/</u>	427	416	314	351	349
Total North America	8,300	10,074	10,754	10,296	11,079
South America:					
Brazil	28,300	27,000	28,200	10,000	33,000
Colombia	7,360	7,500	7,800	8,100	8,000
Ecuador	521	800	700	800	865
Peru	324	770	815	870	880
Venezuela	835	850	890	800	850
Other <u>5/</u>	63	124	128	128	128
Total South America	37,403	37,044	38,533	20,698	43,723
Africa:					
Angola	1,443	3,100	2,800	3,200	3,100
Burundi <u>6/</u>	<u>7/</u> 110	110	250	200	225
Cameroon <u>8/</u>	405	825	900	950	1,000
Central African Republic	<u>3/</u> 41	105	210	150	175
Congo (Leopoldville)	1,195	1,100	1,100	800	1,000
Ethiopia	1,100	1,490	1,600	1,550	1,570
Guinea	<u>9/</u> 114	215	175	170	170
Ivory Coast	2,130	3,350	4,350	3,500	4,500
Kenya	415	635	740	775	820
Malagasy Republic	902	1,000	835	1,050	885
Rwanda <u>6/</u>	<u>7/</u> 85	85	145	155	165
Tanzania <u>10/</u>	375	470	545	560	575
Togo	122	177	230	200	225
Uganda	1,508	2,945	2,900	2,700	2,900
Other <u>11/</u>	332	400	429	442	441
Total Africa	10,082	16,007	17,209	16,402	17,751
Asia and Oceania:					
India	712	1,020	1,240	1,065	1,180
Indonesia	1,343	2,330	1,900	2,200	2,000
Philippines	199	550	655	700	675
Yemen	88	82	80	90	100
Other <u>12/</u>	179	280	319	337	337
Total Asia and Oceania	2,521	4,262	4,194	4,392	4,292
World total production	58,306	67,387	70,690	51,788	76,845

1/ The coffee marketing season begins during the second half of the calendar year, starting in some countries like Brazil as early as July 1 and in other countries about October 1. 2/ 132,276 pounds each. 3/ 2-year average. 4/ Includes Guadeloupe, Hawaii, Jamaica, Martinique, and Puerto Rico. 5/ Includes Bolivia, British Guiana, Paraguay, and Surinam. 6/ Prior to 1962-63 was shown as Ruanda-Urundi. 7/ Shown in Congo (Leopoldville) prior to 1959-60. Combined exports for Rwanda and Burundi in 1959-60 totaled 160,000 bags. 8/ Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. 9/ 3-year average. 10/ Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. 11/ Includes Cape Verde, Comoro Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Congo (Brazzaville), Sao Tome and Principe, Sierra Leone, and Spanish Guinea. 12/ Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

Foreign Agricultural Service. Prepared or estimated on the basis of official statistics of foreign governments, other foreign source materials, reports of Agricultural Attaches and Foreign Service Officers, results of office research and related information.

GREEN COFFEE: World exportable production for the marketing year 1965-66, with comparisons ^{1/}

Continent and country	Average 1955/56- 1959/60	1962-63	1963-64	1964-65	2nd estimate 1965-66
	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>	1,000 bags <u>2/</u>
North America:					
Costa Rica	658	930	970	685	780
Cuba	207	50	---	---	---
Dominican Republic	421	420	540	525	545
El Salvador	1,327	1,540	1,885	1,780	1,950
Guatemala	1,158	1,700	1,580	1,390	1,690
Haiti	435	425	365	390	420
Honduras	262	335	320	340	375
Mexico	1,369	1,250	1,855	1,600	1,800
Nicaragua	334	460	405	510	455
Panama	<u>3/</u> 10	19	26	25	30
Trinidad & Tobago	37	53	68	65	70
Other <u>4/</u>	171	122	55	63	68
Total North America	6,389	7,304	8,069	7,373	8,183
South America:					
Brazil	23,360	20,000	21,200	3,000	25,800
Colombia	6,550	6,500	7,200	7,000	6,800
Ecuador	422	630	525	615	675
Peru	251	605	630	670	675
Venezuela	472	370	395	300	345
Other <u>5/</u>	44	73	77	72	72
Total South America	31,099	28,178	30,027	11,657	34,367
Africa:					
Angola	1,427	3,050	2,750	3,145	3,040
Burundi <u>6/</u>	77	105	245	195	220
Cameroon <u>8/</u>	396	805	875	920	970
Central African Republic	<u>3/</u> 37	100	205	145	170
Congo (Leopoldville)	1,164	1,050	1,050	750	950
Ethiopia	850	1,150	1,250	1,200	1,215
Guinea	<u>9/</u> 105	200	160	155	155
Ivory Coast	2,063	3,300	4,300	3,450	4,450
Kenya	399	615	720	755	800
Malagasy Republic	812	900	735	950	785
Rwanda <u>6/</u>	77	80	140	150	160
Tanzania <u>10/</u>	369	455	530	545	560
Togo	121	175	225	195	220
Uganda	1,454	2,930	2,885	2,685	2,885
Other <u>11/</u>	308	367	396	408	407
Total Africa	9,505	15,282	16,466	15,648	16,987
Asia and Oceania:					
India	223	365	620	425	530
Indonesia	1,120	2,080	1,600	1,850	1,650
Philippines	---	---	---	---	---
Yemen	74	72	70	80	90
Other <u>12/</u>	63	135	139	147	147
Total Asia and Oceania	1,480	2,652	2,429	2,502	2,417
World exportable production	48,473	53,416	56,991	37,180	61,954

^{1/} The coffee marketing season begins during the second half of the calendar year starting in some countries like Brazil as early as July 1 and in other countries about October 1. Exportable production represents total production minus consumption, except for Brazil prior to 1959-60 which was based on "registrations" of current crop minus port consumption and coastwise shipments. ^{2/} 132,276 pounds each. ^{3/} 2-year average. ^{4/} Includes Guadeloupe, Hawaii, Jamaica, and Puerto Rico. ^{5/} Includes Bolivia, British Guiana, Paraguay and Surinam. ^{6/} Prior to 1962-63, was shown as Ruanda-Urundi. ^{7/} Shown in Congo (Leopoldville) prior to 1959-60. Combined exports for Rwanda and Burundi in 1959-60 totaled 160,000 bags. ^{8/} Beginning with 1961-62 includes West Cameroon. Prior to 1961-62 this area was identified as Southern Cameroon and its production was included with Nigeria. ^{9/} 3-year average. ^{10/} Prior to 1964-65 year was shown as Tanganyika. Now includes Zanzibar as well. ^{11/} Includes Cape Verde, Comoro Islands, Dahomey, Gabon, Ghana, Liberia, Nigeria, Congo (Brazzaville), Sao Tome and Principe, Sierra Leone, and Spanish Guinea. ^{12/} Includes Malaysia, New Caledonia, New Hebrides, Papua and New Guinea, Portuguese Timor and Vietnam.

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In Costa Rica, the 1965-66 crop is expected to be up, as that country continues to recover from the natural disasters which affected the 1964-65 crop. The latter crop also came in larger than was expected earlier. In Guatemala, one of the largest crops ever harvested is expected as a result of good growing conditions as well as the progress that has been made against a serious insect pest, the coffee leaf miner. Improved cultural practices are credited for at least part of the larger crops in El Salvador, Mexico, and Honduras. In the first two countries, 1965-66 will also be an "up" year in the production cycle. The 1965-66 crop in Nicaragua is estimated down from the big crop of 1964-65.

South America: Total 1965-66 production in South America is expected to reach 43.7 million bags, with exportable at 34.4 million bags. This is more than double the total output of 20.7 million bags, and almost triple the exportable production, in 1964-65.

The principal reason for the increase in South America in 1965-66 is, of course, the recovery in Brazilian production. A slight August frost in Sao Paulo and Minas Gerais has not damaged 1965-66 production but will probably mean a slight reduction in their 1966-67 output. Total registration figures for the 1964-65 Brazilian coffee year (July-June) were considerably higher than previously estimated, meaning that production in 1964-65 was larger than earlier thought and that more coffee had been held over from 1963-64 than previously estimated. In light of this, the Foreign Agricultural Service has revised both its 1963-64 and 1964-65 estimates for Brazil.

Elsewhere in South America, Ecuador, Peru, and Venezuela are all expected to produce more coffee in 1965-66 than in a year earlier, while Colombia's output is expected to be down slightly.

Africa: Total African production in 1965-66 should reach a total of 17.8 million bags, of which 17.0 is exportable production. This compares with 16.4 and 15.6 million bags, respectively, in 1964-65. During the 5-year period 1955-56 to 1959-60, the average total output was 10.2, of which 9.6 million was exportable production.

Present indications are that the 1965-66 crop in the Ivory Coast, the world's third-largest producer, will reach a record level in this "up" year in its production cycle. In Uganda, production is still expected to be up from 1964-65, although estimates of output for both years are now down, because of prolonged dry weather which has reportedly reduced yields considerably. Production in Angola is expected to be down slightly from the peak reached in 1964-65.

The crop in the Congo (Leopoldville) is expected to be up in 1965-66 as some coffee growers return to farms that they left earlier because of political instability. Kenya's output has been reduced slightly by continuing inroads of Coffee Berry Disease, plus untimely rains.

Asia and Oceania: The total output for Asia and Oceania in 1965-66 is now estimated at 4.3 million bags, as compared with 4.4 million in 1964-65. Exportable production is 2.4 million bags as compared with 2.5 million a year earlier.

Production in the Philippines is expected to be down slightly in 1965-66 because of insect damage. (Production in earlier years has been revised in the accompanying table to correct a clerical error in the first estimate of the 1965-66 crop.) The Philippines is generally a net importer of coffee.

Exportable Production in Smaller Producing Countries: Based on such information as is available, exportable production in smaller producing countries is estimated to be as follows (with comparable 1964-65 estimates in parentheses) in bags: Jamaica 20,000 (15,000); Puerto Rico 25,000 (25,000); Bolivia 20,000 (20,000); Paraguay 40,000 (40,000); Surinam 8,000 (8,000); Dahomey 28,000 (28,000); Gabon 18,000 (19,000); Ghana 48,000 (48,000); Liberia 58,000 (58,000); Nigeria 33,000 (33,000); Congo (Brazzaville) 14,000 (14,000); Sao Tome and Principe 5,000 (5,000); Sierra Leone 90,000 (90,000); Spanish Guinea 110,000 (110,000); New Caledonia 30,000 (30,000); Papua and New Guinea 80,000 (80,000); and Portuguese Timor 33,000 (33,000).

World Trade and Developments

World trade in coffee in the 1964-65 coffee marketing year (ending September 30, 1965) was considerably below that of a year earlier. This lower level was the result largely of a drawdown in stocks during the year in principal importing countries. Assuming that consumer-country stocks will not go much below the present level, world trade should increase slightly in 1965-66.

Coffee developments in the United States in 1964-65 were probably also a good indication of what happened in other importing countries. Stocks, which totaled about 4.1 million bags on October 1, 1964, climbed to 4.5 by the end of the year and fell off to 2.6 million on June 30, 1965. Stocks were decreased because the trade anticipated that lower prices would follow the large crop. A weakening of prices has thus far been averted, however, by the International Coffee Agreement and its "Indicator Price" scheme, a plan which was inaugurated in the spring of 1965. Hence, with prices remaining fairly firm, there was no rebuilding of stocks to the higher levels of a year earlier. First estimates of U. S. imports of green coffee during the 1964-65 marketing year indicate that the level was almost 2.5 million bags below that of 1963-64, 23.3 million bags.

On a fiscal year basis, U. S. gross imports of green coffee for the year ended June 30, 1965 totaled 20.2 million bags, valued at \$1,072 million. This was a decrease of 4.4 million bags from corresponding imports in the same period a year earlier, with the dollar value down by \$46 million. Reexports of green coffee from the United States during July-June 1964-65 totaled 534,598 bags, as compared with 567,824 bags in the previous year.

During January-June 1965, Brazil supplied only 23 percent of U. S. green coffee imports, as compared with 33 percent during the first 6 months of 1964, and 31 percent during calendar 1964. The African and Asian share (mostly Robusta-type coffee) of the U. S. market was 31 percent during the first 6 months of 1965, as compared with 29 percent in the same period in 1964 and the same percentage in the entire calendar year of 1964. Mild Arabicas showed the biggest increase in the January-June 1965 period, jumping to 46 percent of the total, as compared with 38 percent in the first 6 months of 1964. The biggest increase was in imports from Central America and Mexico, which were running at 23 percent during the first half of 1965, as compared with 18 percent a year earlier and 16 percent in calendar 1964.

Inventories of green coffee held by roasters, importers, and dealers in the United States on June 30, 1965, were 2,591,000 bags, down 1,625,000 bags, or 26 percent, from a year earlier.

Total U. S. roastings for the first 6 months of 1965 were 10,731,000 bags, as compared with 11,661,000 bags in the same period in 1964, and 22,374,000 bags in all 1964. Roastings for soluble use (included in the above data) reached 1,842,000 bags in January-June 1964, as compared with 1,970,000 bags in the first half of 1963. Thus, it appears that roastings for soluble use are continuing their downward trend from the peak reached in 1962.

Spot prices for Brazilian coffees, New York market, averaged slightly lower in September than in the previous 8 months of 1965. Colombians were up slightly over the August level. Robusta prices (Ambriz AA's) continued to strengthen and averaged almost 36 cents a pound in September, as compared with 33 cents in July and less than 23 cents in May of this year.

Retail prices for roasted coffee in one-pound cans averaged 83.5 cents in August, as compared with 83.2 cents in June, according to the U. S. Bureau of Labor Statistics.

The International Coffee Council met in London in August to review the operation of the International Coffee Agreement to date. There was general satisfaction with the Agreement thus far, although it was realized that there are still many problems to be faced. One of the most important of these is a

world production total which continues to increase faster than consumption. To study this problem, the Council resolved to set up a working group to examine all available data relative to basic quotas and production goals and to present its conclusions and recommendations to the Executive Board by November 1, 1965. The Executive Board, in turn, is to review the working group's findings and prepare appropriate draft resolutions for the consideration by the Council before December 31, 1965. The group is also to recommend a policy relative to coffee stocks.

Also discussed at the August meeting was the potential threat to the Agreement of increasing exports from nonmember countries. The Council resolved that all importing members should immediately prepare and report on their respective plans for limiting imports from nonmembers should their share of the world market rise above 5 percent. Such plans will be put into effect if, and when, the executive director of the Agreement determines that such exports have exceeded 5 percent of the global total.

GREEN COFFEE: U. S. gross imports for consumption by months, 1961-65

Year and Month	1961	1962	1963	1964 ^{1/}	1965 ^{2/}
	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>	<u>Bags 3/</u>
January	1,951,110	2,294,540	1,241,088	1,977,276	460,698
February	1,715,463	2,310,778	2,238,665	1,969,568	1,295,938
March	2,234,714	1,828,026	2,157,406	2,476,132	2,446,165
April	1,771,045	1,859,220	2,245,754	2,459,757	1,658,847
May	1,719,310	2,006,712	1,797,858	1,597,003	1,553,587
June	2,044,567	1,550,237	1,332,142	1,343,896	1,830,766
January - June	11,436,209	11,849,513	11,012,913	11,823,632	9,246,001
July	1,633,002	1,678,724	1,956,858	1,552,377	5/
August	1,775,779	2,003,959	1,887,944	1,428,029	5/
September	1,864,476	2,074,355	2,166,907	1,659,684	5/
October	1,934,063	2,074,786	2,486,099	1,960,222	5/
November	1,604,276	2,256,432	2,181,114	2,329,666	5/
December	2,084,712	2,542,413	2,143,244	2,068,706	5/
July - December ...	10,896,308	12,630,669	12,822,166	10,998,684	5/
Calendar year total:	22,332,517	24,480,182	23,835,079	22,822,316	5/
Fiscal year total ^{4/} :	22,777,048	22,745,821	23,643,582	24,645,798	20,244,685

^{1/} Revised. ^{2/} Preliminary.

^{3/} 132.276 pounds each. ^{4/} Twelve months, ending June 30 of year shown. ^{5/} Not avail.

United States Bureau of Census.

GREEN COFFEE: U. S. gross imports by country or area of origin

Area of origin	Average		1963		1964		1964		1965 ^{1/}	
	1955-59						Jan.-June		Jan.-June	
	Mil.	Per-	Mil.	Per-	Mil.	Per-	Mil.	Per-	Mil.	Per-
	bags	cent	bags	cent	bags	cent	bags	cent	bags	cent
	<u>2/</u>		<u>2/</u>		<u>2/</u>		<u>2/</u>		<u>2/</u>	
Brazil	8.91	42	9.27	39	7.21	31	3.86	33	2.12	23
Africa and Asia	2.86	14	5.56	23	6.57	29	3.42	29	2.85	31
Mild coffees:										
Colombia	4.54	22	3.94	17	3.70	16	1.67	14	1.44	15
Other South America84	4	1.13	5	1.08	5	.38	3	.43	5
Mexico and Central										
America	3.30	15	3.41	14	3.57	16	2.17	18	2.15	23
Caribbean55	3	.53	2	.69	3	.32	3	.26	3
Total milds	9.23	44	9.01	38	9.04	40	4.54	38	4.28	46
Total world	21.00	100	23.84	100	22.82	100	11.82	100	9.25	100

^{1/} Preliminary.

^{2/} 132.276 pounds each.

United States Bureau of Census

COFFEE: Annual export quotas under the International Coffee Agreement and their distribution by quarters, 1965-66
(Bags of 132.276 pounds)

Exporting Countries	Basic Quota	Adjustment	Effective Quota	October-December		January-March		April-June		July-September	
				Per- cent	Bags	Per- cent	Bags	Per- cent	Bags	Per- cent	Bags
Brazil	18,000,000		16,975,911	25	4,243,978	25	4,243,978	25	4,243,978	25	4,243,978
Burundi	170,000	287,500	271,143	25	67,786	25	67,786	25	67,786	25	67,786
Colombia	6,011,280		5,669,275	25	1,417,319	25	1,417,319	25	1,417,319	25	1,417,319
Congo (D.R.)	700,000	1,140,000	1,075,141	20	215,028	30	322,542	30	322,542	20	215,028
Costa Rica	950,000		895,951	20	179,190	35	313,583	25	223,988	20	179,190
Cuba	200,000		188,621	20	37,724	30	56,587	25	47,155	25	47,155
Dominican Republic	425,000		1/ 297,967	35	104,289	30	89,390	20	59,593	15	44,695
Ecuador	552,000		520,594	30	156,178	15	78,089	5	26,030	50	260,297
El Salvador	1,429,500		1,348,170	30	404,451	30	404,451	20	269,634	20	269,634
Ethiopia	1,175,000		1,108,150	30	332,445	30	332,445	20	221,630	20	221,630
Ghana	43,000		40,554	30	12,166	30	12,166	20	8,111	20	8,111
Guatemala	1,344,500		1,268,006	30	380,402	30	380,402	20	253,601	20	253,601
Haiti	420,000		396,105	30	118,832	30	118,831	20	79,221	20	79,221
India	360,000		339,519	25	84,880	20	67,904	30	101,855	25	84,880
Indonesia	1,176,000		1,109,093	25	277,273	25	277,273	25	277,273	25	277,273
Mexico	1,509,000		1,423,147	30	426,944	28	398,481	20	284,629	22	313,093
Nicaragua	419,100		2/ 330,745	35	137,811	30	97,123	20	57,749	15	38,062
Nigeria	18,000		25,000	30	7,500	25	6,250	25	6,250	20	5,000
OAMCAF 3/	4,302,125		4,057,360	25	1,014,340	30	1,217,208	25	1,014,340	20	811,472
Panama	26,000		25,000	25	6,250	25	6,250	25	6,250	25	6,250
Peru	580,000		547,002	30	164,101	15	82,050	30	164,101	25	136,750
Portugal	2,188,648		2,064,127	30	619,238	28	577,956	20	412,825	22	454,108
Rwanda	170,000	212,500	200,410	25	50,102	25	50,103	25	50,102	25	50,103
Sierra Leone	65,000		61,302	20	12,260	20	12,261	40	24,521	20	12,260
Tanzania	435,458		410,684	30	123,205	30	123,205	20	82,137	20	82,137
Trinidad & Tobago	44,000		41,497	25	10,374	35	14,524	20	8,299	20	8,300
Uganda	1,887,737		1,780,336	25	445,084	25	445,084	25	445,084	25	445,084
Venezuela	475,000		447,975	25	111,994	35	156,791	20	89,595	20	89,595
SUB-TOTAL	45,076,348	45,676,348	42,918,785	26.0	11,161,144	26.5	11,370,032	23.9	10,265,600	23.6	10,122,009
Non-Members											
Bolivia	-		25,000	25	6,250	25	6,250	25	6,250	25	6,250
Honduras	285,000		268,785	10	26,879	50	134,392	20	53,757	20	53,757
Kenya	516,835		487,430	30	146,229	30	146,229	20	97,486	20	97,486
TOTAL	45,878,183	46,478,183	43,700,000	25.9	11,340,502	26.7	11,656,903	23.9	10,423,093	23.5	10,279,502

1/ Quota reduced by 101,321 bags in accordance with Resolution No. 73.

2/ Quota reduced by 63,000 bags and quarterly distribution set in accordance with Resolution No. 90.

3/ The African and Malagasy Coffee Organization, representing Cameroon, Central African Republic, Congo (Brazzaville), Dahomey, Gabon, Ivory Coast, Malagasy Republic, and Togo.

Source: International Coffee Council Resolution No. 91 (August 19, 1965)

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